

CAMIS

PROJECT REQUEST – SOP

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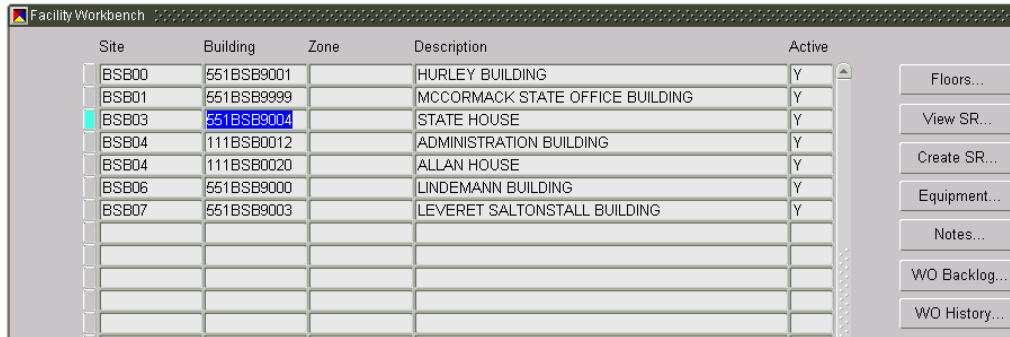
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I. SEARCHING PROJECTS:

1. FACILITY WORKBENCH:

To search for a Project:

- **Locate** the CAMIS Building number in the Facility WorkBench.

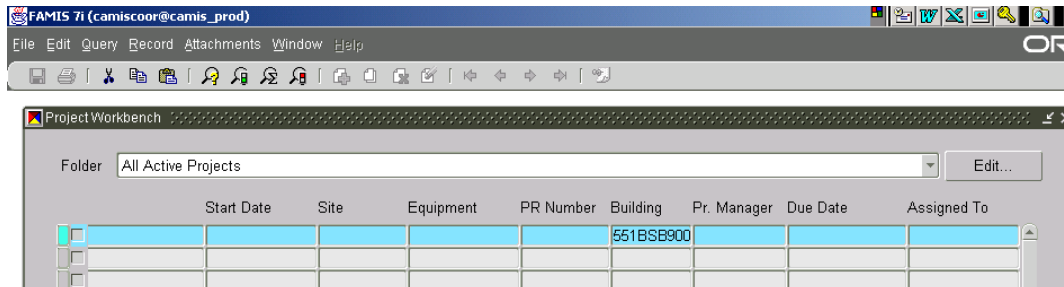


Site	Building	Zone	Description	Active
BSB00	551BSB9001		HURLEY BUILDING	Y
BSB01	551BSB9999		MCCORMACK STATE OFFICE BUILDING	Y
BSB03	551BSB9004		STATE HOUSE	Y
BSB04	111BSB0012		ADMINISTRATION BUILDING	Y
BSB04	111BSB0020		ALLAN HOUSE	Y
BSB06	551BSB9000		LINDEMANN BUILDING	Y
BSB07	551BSB9003		LEVERET SALTONSTALL BUILDING	Y

Note: *Highlight* & copy **CNTRL+C** the Building number of your choice, i.e. 551BSB9004

2. PROJECT WORKBENCH:

- **Go to** the **Project WorkBench** screen, Folder view All Active Projects
- **Click** on the **Yellow Question Mark** or **F7** to Query.
- **Paste** or **CNTRL+V** the CAMIS Building number into the Building Field.



Start Date	Site	Equipment	PR Number	Building	Pr. Manager	Due Date	Assigned To
				551BSB900			

- **Click** on the **Green Traffic Light** or **F8** to execute this query.

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PROJECT WORKBENCH:

Result: The active projects for this Building are listed.

Requestor	Pr Status	Type	Description	Start Date	Site	Equipment
PBSURVEY2000	44 IDENTIFIED	PRIMARY	REPAIR SUBSYSTEM DISTRIBUTN-PAN		BSB03	551BSB9004-40
PBSURVEY2000	44 IDENTIFIED	PRIMARY	REPAIR SUBSYSTEM FLOORS-CIPCON		BSB03	551BSB9004-43
	42 IDENTIFIED	ACCESS-M/	ACCESS-MA: - STATE HOUSE		BSB03	551BSB9004INT
PBSURVEY2000	42 IDENTIFIED	LSC	LSC: STATE HOUSE		BSB03	551BSB9004INT

- **Select** the **Project** you are searching for by **clicking** on it.
- **Click** on the **View Plan** button for more detail about the project, **if necessary**.
- Use the **bar** at the bottom of the Project WorkBench to **scroll** to the PR Number field.

Start Date	Site	Equipment	PR Number	Building	Pr. Manager	Due Date	Assigned To
	BSB03	551BSB9004-40	J000088049	551BSB900			
	BSB03	551BSB9004-43	J000088058	551BSB900			
	BSB03	551BSB9004INT	J000098690	551BSB900			
	BSB03	551BSB9004INT	J000094525	551BSB900			

Note: The PR Number is your CAMIS Project Number, i.e. J000088049.

If the Project you are looking for is not listed, continue on to create a new project.

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II. CREATING PROJECTS:

1. PROJECT PLAN:

To **create** a Project *without* having to go through a formal project approval process:

- **Go to the Project Plan Screen.**

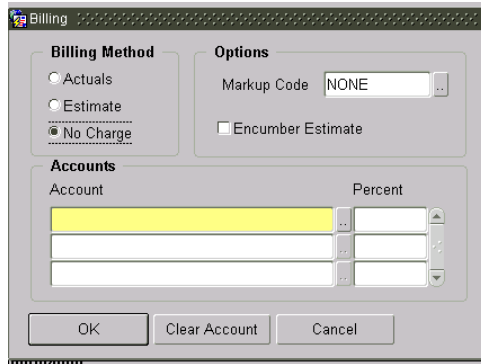
The screenshot shows the 'Project Plan' window. At the top, the PR Number is set to '**ASSIGN**' and the description is 'NEW ATHLETIC FACILITY BUILDING - FSC'. Below this are fields for Parent Project and Capital Project. The 'Requestor' section includes fields for Requestor, Telephone, Alt. Requestor, Alt. Telephone, and Request Date (set to 'MON SEP 8, 2003'). The 'Location' section includes Site (set to 'FSC01'), Building (set to '304FSCPB09'), Floor, Room, and Zone. The 'Equipment' section has a dropdown menu. The 'General Information' section includes Type (set to 'ADMIN'), Priority (set to '43'), Status (set to 'ACTIVE'), Assigned To, Project Manager (set to 'JREARDON'), Due Date (set to 'THU NOV 17, 2005'), Proj Start Date, Est Start Date, and Est Completion Date. On the right side, there are buttons for Phases..., Billing..., Estimates..., Comments..., Amendments..., E-mail..., Dates..., and Audit...

- **Tab** from the Project Request Number field to *AUTO* ****ASSIGN**** the next available Project Number.
- **Type** in the **Project Description**
- **Select** the **Parent Project**, if necessary
- **Select** the **Capital Project**, if known or necessary
- **Type** in the **Project Requestor**, Telephone number and Alternate Requestor information, if necessary
- **Tab** to the **Site** field and select the appropriate site.
- **Tab** to the **Building** field and select the appropriate building, if applicable.
- **Select** the appropriate **Floor** and **Room** information, if applicable.
- **Tab** to the **Equipment** Field and select the appropriate Equipment Record or Building System from the Dropdown list or Press F9 for list of values, if applicable.
- **Tab** to the **Type** Field and select the appropriate Project Type.
- **Tab** to the **Priority** Field and select the appropriate Project Priority.
- **Tab** to the **Status** Field and select the appropriate status, *i.e. ACTIVE*.
- **Tab** to the **Assigned** to field and select if necessary.
- **Tab** to the **Project Manager** field and select a Project Manager, if applicable.
- **Tab** to the **Due Date** field and type in the Due Date, *i.e. 11/17/05*.
- **Click** on the **Billing** Button.

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2. PROJECT PLAN SCREEN - BILLING:



The Billing dialog box contains the following sections:

- Billing Method:** Radio buttons for Actuals, Estimate, and No Charge (selected).
- Options:** Markup Code dropdown (set to NONE) and an Encumber Estimate checkbox.
- Accounts:** A table with two columns: Account and Percent.

Account	Percent

Buttons at the bottom: OK, Clear Account, Cancel.

If you have no particular account to bill this project to:

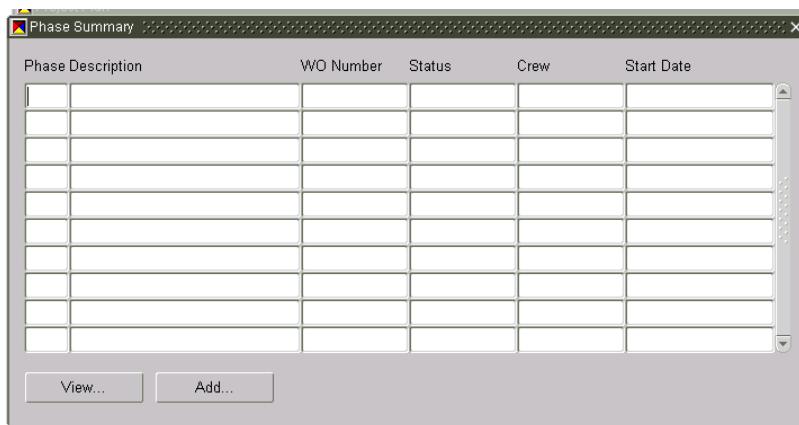
- **Select No Charge**, and **click OK**

Note: Unless specifically designated – No Charge will always be used since there is no current interface between MMARS and CAMIS.

Specific accounts *can* be designated – Ask CAMIS Staff for guidelines.

- **Click** on the **Phases** Button

3. PROJECT PLAN – PHASE SUMMARY



The Phase Summary dialog box features a table with the following columns: Phase Description, WO Number, Status, Crew, and Start Date.

Phase Description	WO Number	Status	Crew	Start Date

Buttons at the bottom: View..., Add...

- **Click** on the **Add** Button to add a phase.

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4. PROJECT PLAN SCREEN - PHASE:

- **Type** the phase **description**
- **Tab** to the **Status** field and select the status, *i.e. OPEN*
- **Tab** to the **Start** field and type the start date, *i.e. 9/17/03*
- **Tab** to the **Due Date** field and type the due date, *i.e. 11/17/05*
- **Tab** to the **Method** field and select the appropriate method, if necessary
- **Tab** to the **Requested Start Date** and type in the appropriate date.
- **Tab** to the **Requested Completion Date** and type in the appropriate date
- **Click** in the **Permit Required** field, if necessary
- **Tab** to **Phase Type** – Default is **PLANNED**
- **Tab** to **Crew**, **Craft**, **Crew Size** and **Est Hours** – fill in as necessary
- **Tab** to **Task List** – Enter in Tasks as necessary, *i.e. Construct New Building*.

Note: You can associate any additional detailed information as necessary or available by clicking on the **Library**, **Labor**, **Parts**, **Tools**, or **P.O.s** Buttons.
Fill in as necessary.

To proceed:

- **Click** on the **Estimate** Button

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5. PROJECT PLAN SCREEN - ESTIMATES:

The screenshot shows the 'Estimates' window with the following data:

Phase Work Estimate			Detailed Estimate	
	Estimate	Markup	Total	
Primary Labor	.00	.00	.00	DE Number
Supporting Labor	.00	.00	.00	Hours
Labor	.00	.00	.00	Labor
Material			.00	Material
Invoice	9,299,217.56	.00	9,299,217.56	Invoice
Equipment				Equipment
Contingency				Total
Total Est.	9,299,217.56	.00	9,299,217.56	Detailed Estimate...

Buttons: OK, Detailed Estimate...

- *Click* in the **Invoice** field and *type* in the **Total Estimated Cost** for that Phase, and *click* on the **OK** Button.

Result: This brings you back to the Phase Screen.

- *Click* on the **OK** Button